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TO: Susan Alter DATE: November 4, 1985

FROM: Nancy Gurry

SUBJECT: Concord

This report highlights Concord's share performance based on the following data sources - factory shipments, ICC distributors sales, and retail audit shares. Factory shipments commenced 7/25 with introduction at retail effective 8/05.

Concord Regular (Little Rock & Spokane)

- As viewed in the rolling four week averages, factory shipments, based on a two market average, have held steady at the 0.1 to 0.2 share level. There appears to be virtually no product movement during the last four weeks in each of these markets. However, the current week's (10/25) negative share levels in Little Rock reflect Ft. Smith's Tobacco (3% of direct volume) return of 7 cases of Concord caused by an overflow of product in anticipation of retail ordering.

- Distributor sales parallel factory shipments in reporting essentially no product movement. Shares have been at a depressed 0.1 level during the past four weeks.

- Retail sales, based on the latest four weeks, averaged at the 0.8 level while the current week (10/11) posted a 0.7 share in the Little Rock area. However, retailers have been returning Concord to their distributors. This removal of product would indicate a sale in our audit panel if it occurred in one of the panel stores. Therefore, the levels in the audit would be somewhat inflated.

Concord Menthol (Birmingham & Ft. Wayne)

- There appears to be minimal product movement in the two menthol markets with shipments registering at/or below the 0.1 level for nine consecutive weeks based on a two market average.

- The current week's sales, (10/04) based on ICC data, have fallen to the 0.1 level with no share discrepancy existing between the two markets. Collectively, these two menthol markets have a 0.7 share based on a current four week average. This figure may be influenced by high pull through associated with the supplemental display program implemented two weeks ago.

- Similar to Little Rock, audit sales are also high in the Birmingham area when compared to the other data sources. The wholesalers in this area are also pulling the brand from their retail accounts in order to appease their customers. As mentioned above, this would constitute a sale in our Birmingham panel. Consequently, this would have a significant impact on indicated levels.

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Source: https://www.industrydocuments.ucsf.edu/docs/zgwl0000

This analysis will be updated. If you have any questions, please call.

Nancy

NG/sl

cc:

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CONCORD

FACTORY SHIPMENTS

		CONCORD REGULAR						CONCORD MENTHOL					
		Little Rock		Spokane		2 Market Average		Birmingham		Ft. Wayne		2 Market Average	
Base Period	Week Ending	Week	4 Wk. Avg.	Week	4 Wk. Avg.	Week	4 Wk. Avg.	Week	4 Wk. Avg.	Week	4 Wk. Avg.	Week	4 Wk. Avg.
1	* 8/02	4.85	--	3.31	--	4.08	--	2.71	--	2.53	--	2.62	--
2	8/09	1.38	--	.91	--	1.15	--	.55	--	.08	--	.32	--
3	8/16	.19	--	.65	--	.42	--	.35	--	.45	--	.40	--
4	8/23	.66	1.77	.12	1.25	.39	1.51	.48	1.02	.63	.92	.55	.97
5	8/30	.19	.61	.35	.51	.27	.56	.11	.37	.06	.31	.09	.34
6	9/06	.45	.37	.14	.32	.30	.35	.01	.24	.07	.30	.04	.27
7	9/13	.20	.38	.03	.16	.12	.27	.10	.18	.13	.22	.12	.20
8	9/20	.10	.24	.08	.15	.09	.20	.12	.09	.01	.07	.07	.08
9	9/27	.24	.25	.32	.14	.28	.20	.11	.09	.01	.06	.06	.07
10	10/04	.08	.16	.15	.15	.12	.15	.17	.13	.07	.06	.12	.09
11	10/11	.02	.11	.03	.15	.03	.13	.07	.12	.09	.05	.08	.08
12	10/18	.00	.09	.11	.15	.06	.12	.06	.10	.05	.06	.06	.08
13	10/25**	-.10	.00	.10	.10	.00	.05	.01	.08	.02	.06	.02	.07

* Includes 7 days of shipments as well as 2 for 1 promotional allocations.

** Reflects Ft. Smith's product return.

	Out of Market Transshipments
Little Rock	13%
Spokane	9
Birmingham	24
Ft. Wayne	59

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CONCORD

ICC

Week Ending	CONCORD REGULAR		CONCORD MENTHOL					
	Little Rock		Birmingham		Ft. Wayne		2 Market Average	
	Week	4 Wk. Mov.	Week	4 Wk. Avg.	Week	4 Wk. Avg.	Week	4 Wk. Avg.
8/02	.22	--	.45	--	.37	--	.41	--
8/09	.75*	--	1.20	--	.63	--	.92	--
8/16	.58	--	.93	--	.52	--	.73	--
8/23	.30	.46	.39	.74	1.02	.64	.71	.69
8/30	.85	.62	.35	.72	1.26	.86	.81	.79
9/06	.12	.46	.04	.43	.11	.73	.08	.58
9/13	.23	.38	.25	.26	.67	.77	.46	.52
9/20	.08	.32	.38	.26	1.59	.91	.99	.59
9/27	.13	.14	.31	.25	1.06	.86	.69	.56
10/04	.09	.13	1.11	.51	.85	1.04	.98	.78
10/11	.14	.11	.06	.47	.11	.90	.09	.69
10/18								
10/25								

* Now reflects a 2 distributor average.

NOTE: The following indicates the number of PM sales reps who are headquartered out of each ICC distributor.

	# of PM Sales Reps
Little Rock	1
Birmingham	0
Ft. Wayne	1

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RETAIL AUDITS

	Little Rock/Regular (25 stores)					Birmingham /Menthol (30 stores)							
Week Ending	Concord	True	Vantage	Merit	Kent	Concord	B&H Men.	V.S. Men.	Marlboro Men.	Merit Men.	Salem Men.	Newport	Kool
8/16	.5	.5	4.9	2.7	2.4	.5	3.7	2.9	1.0	2.8	5.8	1.2	6.1
8/23	.6	.8	6.1	4.7	3.1	1.4	3.4	3.1	1.1	3.3	6.2	1.1	5.5
8/30	.5	.7	7.5	4.7	3.9	1.4	3.6	3.3	1.1	5.0	6.9	1.4	6.0
9/06	.6	1.1	7.7	3.8	5.2	.9	3.7	3.1	1.1	3.0	6.3	1.4	6.5
9/13	.6	.5	7.1	4.9	4.6	.8	3.5	3.4	1.3	3.6	7.1	1.3	6.2
9/20	.6	.5	7.6	5.0	3.5	.8	3.4	3.1	1.1	3.1	6.5	1.2	6.1
9/27	1.3	.4	6.7	4.3	4.2	1.2	3.5	3.2	1.1	2.6	6.8	1.4	6.4
10/04	.7	.6	5.7	3.8	3.4	.8	3.7	3.0	1.0	3.2	7.1	1.1	7.0
10/11	.7	.7	6.8	4.9	3.2	.8	3.9	3.3	1.0	3.2	7.0	1.1	7.4
4 Week Average	.8	.6	6.7	4.5	3.6	.9	3.6	3.2	1.1	3.0	6.9	1.2	6.7

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